

NEW WORKFIRST CASELOAD MANAGEMENT REPORT



NEW WORKFIRST CASELOAD MANAGEMENT REPORT

Updated: April 21, 2003

Questions? Pls. Contact your Regional WorkFirst Coordinator

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

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NEW WORKFIRST CASELOAD MANAGEMENT REPORT

INTRODUCTION

Report Title: Caseload Management Report

Description:

This report lists unduplicated TANF adult clients (in a hierarchical order by category for the reporting month) excluding exempt, CA clients. The categories in hierarchy order are:

- No components/work list
- RB (referred back from ESD)
- PR (Processing referral back on non-participating clients)
- RX (Attention needed on WPLEX referral)
- Overdue RI (7 day referral to ESD Job Search)
- Overdue Components List (Excludes RB, RX, RI, and PR)
- Contractor/Client Issues and Contractor Assigned, No Referral Date
- Clients in Part-time activities
- Clients with TWEP and Extension Analysis Due, equal or greater than 58 months on TANF
- Clients Post-60 Months with TWEP
- Activity End Preview Section, Daily

TANF adult's characteristics:

- TANF Program Types: F, P, 6, 7, C, R
- Fin Resp = RE or RC
- Fin Resp = PN (for these reports only: RB, RX, Overdue RI, Contractor/Client Issues and Contractors Assigned, No Referral Date)
- HOH Code = AS, AU, GP, HO, SE, SP, OP, OT, OU, UP

Each client's JAS ID has a hyperlink to the case so that the workers can electronically update the case record while viewing the report. Reports with contractor ID links are also available in the Contractor/Client Issues and Contractor Assigned, No Referral date so that the workers can immediately go to the client's data on the report.

This report is available on a CSO, Case Manager, or Social Worker view. The Case Manager and Social Worker data are derived from the e-JAS Demographics screen.

Frequency: Daily (8 AM)
Real-time

Where: WorkFirst Reports/WFR link from e-JAS Home Page

Users: DSHS Community Services Division staff

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

I. MAJOR SECTIONS OF THE REPORT:

A. Clients With No Components/Activities

Hide List	Clients with no components/ activities	
Jas ID	Worker ID	Client Name
3040453	058CSO	
3015951	058CSO	

- This section displays all open TANF cases with no component.
- This section is sorted alphabetically.

Data Source

The screenshot displays the 'ACTIVE COMPONENTS BY BLOCKS' screen in the Workfirst Case Management System. The interface includes a header with 'Information Technology Division' and 'Message Center' buttons. Below the header is a table with columns: Name, Jas Id, Case Number, Tanf Status, Phone Number, and Returner. The table shows one active component for a client with Jas Id 2589754 and Case Number 041C001606903. Below this table is a section titled 'No Active Components' with a table showing columns: Comp/Desc, Contr, Start Date, Blocks, ESD, DSHS, and SchedEnd. The table lists several components with their respective start dates and end dates.

Tips

1. On the Caseload Management Report, click the client's JAS ID.
2. Click Component/IRP Information link on the client's main screen.
3. On the Active Components screen, assign a component and complete the other mandatory fields. Update the IRP if needed.
4. Click Update. Document the case action in the appropriate note type.

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B. Clients Referred Back from ESD

Hide List	Clients referred back from ESD					
Jas ID	Worker ID	Client Name	Comp	Start Date	Other Components	Other Lists
242593	058GRO	[REDACTED]	RB	02/25/2003	SA	
2364996	058SLW		RB	03/05/2003	PS	
3070058	058CSO		RB	03/07/2003		RZ: Overdue component XH: Overdue component

- This section displays all open or pending TANF cases with an RB component, including overdue RB's.
- This section is sorted in order of oldest scheduled start date at top of section ascending by alpha.
- This section displays the clients' other current components.

Data Source

Information Technology Division
Message Center

Home Main Back Update Component History

Child Case Info ICMS Info Message Help

ACTIVE COMPONENTS BY BLOCKS

Name	Jas Id	Case Number	Tanf Status	Phone Number	Returner
[REDACTED]	2131900	0410001518606	Open	2067235197	

Automatic Trans Pay: 0

Comp/Desc	Ctrl	Start	Blocks	ESD	Dshs	SchedEnd	ActualEnd	Cpl
RB REferred BACK EARLY	---	01/31/2003	1	041001	---	0015/2003		---
RX REferred BACK FROM WEEK TO CH	---	02/01/2003	25	041001	---	02/05/2003		---

Comp/Desc	Contr	Start Date	Blocks	ESD	DSHS	SchedEnd
---	---	---	---	---	---	---
---	---	---	---	---	---	---
---	---	---	---	---	---	---
---	---	---	---	---	---	---
---	---	---	---	---	---	---
---	---	---	---	---	---	---
---	---	---	---	---	---	---

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Tips

1. On the Caseload Management Report, click the client's JAS ID.
2. Click Component/IRP Information link on the client's main screen.
3. On the Active Components screen, update the component(s) and complete the other mandatory fields. Update IRP if needed
4. Click Update. Document the case action in the appropriate note type.

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C. Processing Referral Back on Non-Participating Client

Hide List	Processing referral back on non-participating client					
Jas ID	Worker ID	Client	Comp	Start Date	Other Components	Other Lists
3932191	058PAR		PR	02/23/2001		
4214829	058SIC		PR	04/04/2001	XP	
45266	058JHA		PR	04/18/2001		

- This section displays all open or closed TANF cases with a PR component open for 11 or more days (good cause decision needed 10 days after sending 0085-01 letter).
- This section is sorted by the oldest PR start date at the top of section.
- This section includes any overdue PR.
- This section displays the clients' other current components.

Data Source

Name	Jas Id	Case Number	Tanf Status	Phone Number	Returner
	2524594	041C001547930	Closed	2063291754	

Automatic Trans Pay: 0

Comp/Desc	Contr	Start	Blocks	ESD	DSHS	SchedEnd	ActualEnd	Cpl
PR - PROCESSING REFERRAL BACK		01/01/2001	15		04/18/01	01/01/01		

Comp/Desc	Contr	Start Date	Blocks	ESD	DSHS	SchedEnd
PR						
PR						
PR						
PR						
PR						
PR						
PR						
PR						
PR						
PR						

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

Tips

1. On the Caseload Management Report, click the client's JAS ID.
2. Click Component/IRP Information link on the client's main screen.
3. On the Active Components screen, update the component(s) and complete the other mandatory fields. Update the IRP if needed.
4. Click Update. Document the case action in the appropriate note type.

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D. Attention Needed on WPLEX Referral

Hide List	Attention needed on WPLEX referral					
Jas ID	Worker ID	Client Name	Comp	Start Date	Other Components	Other Lists
186134	058CSO		RX	08/11/2002	FT	
166915	058W58		RX	09/10/2002	FT XP	
4551022	058JDK		RX	09/13/2002		ES: No referral date FT: No referral date RS: No referral date

- This section displays all open, pending and closed cases with an RX component.
- This section is sorted by the oldest start date at the top of the section.
- This section includes any overdue RX.
- This section displays the clients' other current components.

Data Source

The screenshot shows a web application interface for the Information Technology Division Message Center. The main heading is "ACTIVE COMPONENTS BY BLOCKS". Below this, there is a table with columns: Name, Jas Id, Case Number, Land Status, Phone Number, and Returner. The first row shows a client with Jas Id 14751 and Case Number 041C001460657, with a status of "Open" and a phone number of 2067681109. Below this table, there is a section for "Automatic Trans Pay" with a value of 0. The main part of the screenshot is a large table with columns: Comp/Desc, Ctr, Start, Blocks, End, Dshs, SchedEnd, ActualEnd, and Cpl. The first row shows a component "RX PERSONAL BACK FROM WHEEL TO ON" with a start date of 01/12/03, 1 block, and an end date of 04/10/03. Below this, there is a table with columns: Comp/Desc, Contr, Start Date, Blocks, ESD, DSHS, and SchedEnd. This table contains multiple rows of data, each with a "Y" in the Comp/Desc column and a "Y" in the Blocks column.

Name	Jas Id	Case Number	Land Status	Phone Number	Returner
	14751	041C001460657	Open	2067681109	

Automatic Trans Pay: 0

Comp/Desc	Ctr	Start	Blocks	End	Dshs	SchedEnd	ActualEnd	Cpl
RX PERSONAL BACK FROM WHEEL TO ON		01/12/03	1	04/10/03	Y	03/02/03		Y

Comp/Desc	Contr	Start Date	Blocks	ESD	DSHS	SchedEnd
Y			Y		Y	
Y			Y		Y	
Y			Y		Y	
Y			Y		Y	
Y			Y		Y	
Y			Y		Y	
Y			Y		Y	
Y			Y		Y	
Y			Y		Y	
Y			Y		Y	

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

Tips

1. On the Caseload Management Report, click the client's JAS ID.
2. Click Component/IRP Information link on the client's main screen.
3. On the Active Components screen, assign a component and complete the other mandatory fields. Update IRP if needed.
4. Click Update. Document case action in the appropriate note type.

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E. Overdue RI Components

Hide List	Overdue RI components					
Jas ID	Worker ID	Client Name	Comp	Start Date	Other Components	Other Lists
2437881	058DOU		RI	02/12/2003		
199947	058W07		RI	02/14/2003		PT: Overdue component Part Time Activities
123981	058HEI		RI	02/28/2003		PP: No referral date Part Time Activities

- This section displays all open or pending TANF cases with an overdue RI
- This section is sorted by the oldest start date at top of section
- This section displays the client's other current components and other critical sections of the report where the clients' participation characteristics maybe present.

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Data Source

Information Technology Division
Message Center

Home Main Back Update Component History

Child Case Info ICMS Info Messages Help

ACTIVE COMPONENTS BY BLOCKS

Name	Jas Id	Case Number	Tanf Status	Phone Number	Returner
[REDACTED]	2799671	0410001334450	Open	2067227727	

Automatic Trans Pay: 0

Comp/Desc	Ctr	Start	Blocks	Esd	Dshs	SchedEnd	ActualEnd	Cpl
JH RESOLUTION OF HOMELESSNESS	1AC	08062002	10		04NEG	06232002		
KJ LEARNING QUALITY TREATMENT	2AA	09072002	75		04NEG	06232002		
BE BASIC EDUCATION	PDQ	07072003	05		04BUI	07142003		
RI REFERRAL TO IRS	222	07152003	05		04APL	07152003		

Comp/Desc	Contr	Start Date	Blocks	ESD	DSHS	SchedEnd
JH			10			
KJ			75			
BE			05			
RI			05			

Tips

1. On the Caseload Management Report, click the client's JAS ID.
2. Click Component/IRP Information link on the client's main screen.
3. On the Active Components screen, assign a component and complete the other mandatory fields. Update IRP if needed.
4. Click Update. Document case action in the appropriate note type.

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F. Overdue Components

Hide List	Overdue Components					
Jas ID	Worker ID	Client Name	Comp	Schd End Date	Other Components	Other Lists
2923494	058DAA		HS	01/31/2002		Part Time Activities
2923494	058DAA		RF	03/11/2002		Part Time Activities
2172982	058CSO		XP	12/31/2002	VE	Part Time Activities

- This section displays all open TANF cases with any overdue component/s (excluding RB, RX, RI and PR).
- This section is sorted by the oldest end date at top of section.
- This section displays the clients' other current components and other critical sections of the report where the clients' participation characteristics maybe present.

Data Source:

Tips

1. On the Caseload Management Report, click the client's JAS ID.
2. Click Component/IRP Information link on the client's main screen.
3. On the Active Components screen, assign a component and complete the other mandatory fields. Update IRP if needed.
4. Click Update. Document case action in the appropriate note type.

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G. Contractor/Client Issues

Hide List	Contractor/Client Issues					
Jas ID	Worker ID	Client Name	Comp	Cntr	Issue	Other Lists
2524731	058RCO		BE	1AC	Rejection dates	CJ: No first contact
3468773	058DOU		BE	3BB	Rejection dates	CJ: No first contact PP: No referral date
3900638	058SLW		CJ	1AC	No first contact	

- This section displays all open, pending and closed TANF cases with active contractors identified on any open component, and,
 - 1) Clients with "Magenta flags" on immediate, monthly non-participation, and monthly non-progress on Contractor Screen either current or previous months (see page 11), or,
 - 2) Clients with "Rejection Dates" on Contractor Screen (see page 11), or,
 - 3) Clients with over 10 days from "Accept Date" and without "First Contact Date" in Contractor Screen (see page 11), or,
 - 4) Clients except RJ or CJ with over 7 days from "Referral Date" and without "Rejected" or "Accepted" entered (see page 11), or,
 - 5) Client in RJ or CJ with over 14 days from referred date and without rejected or accepted entered (see page 11), or,
 - 6) Clients with no actual start date greater than 7 days from scheduled start date of report (see page 11) or,
 - 7) Clients with actual start date greater than 7 days from report date (See page 11)
- This section is sorted in alpha order within each issue type.
- This section displays any other current components and if the client would be on any other critical section

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Data Source:

Contractor Name	Status	PT	02012003	02282003	0	03012003	7	CY	CY
041ABL THURMEL, ARLENE	Suspended	PT	02012003	02282003	0	03012003	7	CY	CY
080A37 HEBETT, BARBARA	Unknown	FZ	01072003	01012003	0	02032003		CY	CY
095007 ABRAHAM, MARC	Unknown	FZ	01092003	01122003	0			CY	CY
001NOH FORD, ANDREW	Open	FZ	01092003	01092003	0	02022003		CY	CY
08DCSO HOLDATHENTON, CDO JAS	Open	CC		08102003	0	07012002		CY	CY
HEBETT, BARBARA	Open	FZ	01092003	01092003	0			CY	CY
HEBETT, BARBARA	Open	AA	01072003		0			CY	CY
HEBETT, BARBARA	Open	HW	01072003	01072003	0			CY	CY
095006 THARMA, RAJNEES	Unknown	FZ	01092003	01092003	0			CY	CY
041ABL	Open	HS	01302003	02012003	0			CY	CY

Sample Report: Report Date, December 20, 2002

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

Tips

- Clients with "Magenta flags" on immediate, monthly non-participation, and monthly non-progress on Contractor Screen
 1. On the Caseload Report screen, highlight and copy the client's JAS ID.
 2. Click the Contractor ID of the client.
 3. On the Contractor Caseload screen for the current month, paste the client's JAS ID on the JAS ID Search field and click Find.
 4. If the client is not found on the current month's active Contractor Caseload screen, click the Terminated Components Client List link.
 5. Click Edit on the Toolbar and enter the client's JAS ID on the Find What Field.
 6. Click Find Next.
 7. If the client is not on the Terminated Components Client List, click Back to go back to the current month's Contractor Caseload screen.
 8. Search for the client's JAS ID in previous month by entering the month and four-digit year on the Previous/Next Month's Caseload field.
 9. Click Go.
 10. Repeat steps 3 – 8 as needed or until the client's name appears.
 11. Click the magenta balls on the Unexcused, Monthly Part or Monthly Prog fields to resolve the issue.
 12. Complete the notes and click Continue with Note List.
 13. Update IRP if needed

Note: Repeat steps 11 and 12 to resolve each magenta ball.

- Clients with "Rejection Dates" on Contractor Screen
 1. On the Caseload Management Report, click the client's JAS ID.
 2. Click the Component/IRP Information link on the client's main screen.
 3. On the Active Components screen, click CTR.
 4. On the Contractor Data screen, enter the rejected Contractor's Actual End Date.
 5. Enter a new Contractor with scheduled start and scheduled end dates as needed.
 6. Click Back to go back to the Active Components screen. Update IRP if needed.
 7. Click Update on the Active Components screen. Document case record in appropriate note type.
- Clients with over 10 days from "Accept Date" and without "First Contact Date" in Contractor Screen
 1. Click the Message Center.
 2. Click New.
 3. On the To Field, enter the three-digit Contractor ID.

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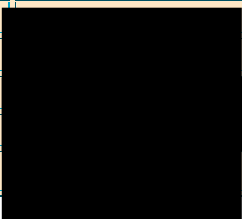
4. Enter the client's JAS ID on the JAS ID field.
 5. Enter the following on the subject line: client's JAS ID, No First Contact Date.
 6. Enter any additional message/requested action from the contractor on the message box.
 7. Click Send.
 8. Update IRP if needed and document the communication in the client's Notes.
- Clients except RJ, CJ, and PP with over 7 days from "Referral Date" and without "Rejected" or "Accepted" entered.
 1. Click the Message Center.
 2. Click New.
 3. On the To Field, enter the three-digit Contractor ID.
 4. Enter the client's JAS ID on the JAS ID field.
 5. Enter the following on the subject line: client's JAS ID, No Accept/Reject.
 6. Enter any additional message/requested action from the contractor on the message box.
 7. Click Send.
 8. Update the IRP if needed and document the communication in the client's Notes.
 - Client in RJ or CJ with over 14 days from referred date and without rejected or accepted entered. (From Schedule Start Date)
 1. Click the Message Center.
 2. Click New.
 3. On the To Field, enter the three-digit Contractor ID.
 4. Enter the client's JAS ID on the JAS ID field.
 5. Enter the following on the subject line: client's JAS ID, No Accept/Reject.
 6. Enter any additional message/requested action from the contractor on the message box.
 7. Click Send.
 8. Update the IRP if needed and document the communication in the client's Notes.
 - Clients in PP with over 3 days from referred date and without rejected or accepted date
 1. Click the Message Center.
 2. Click New.
 3. On the To Field, enter the three-digit Contractor ID.
 4. Enter the client's JAS ID on the JAS ID field.
 5. Enter the following on the subject line: client's JAS ID, No Accept/Reject.
 6. Enter any additional message/requested action from the contractor on the message box.
 7. Click Send.

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

8. Update the IRP if needed and document the communication in the client's Notes.
- Clients with no actual start date greater than 7 days from scheduled start date of report
 1. Click the Message Center.
 2. Click New.
 3. On the To Field, enter the three-digit Contractor ID.
 4. Enter the client's JAS ID on the JAS ID field.
 5. Enter the following on the subject line: client's JAS ID, No Actual Start Date.
 6. Enter any additional message/requested action from the contractor on the message box.
 7. Click Send.
 8. Update the IRP if needed and document the communication in the client's Notes.
 - Clients with actual start date greater than 7 days from report date
 1. Click the Message Center.
 2. Click New.
 3. On the To Field, enter the three-digit Contractor ID.
 4. Enter the client's JAS ID on the JAS ID field.
 5. Enter the following on the subject line: client's JAS ID, Actual Start Date Greater Than 7 Days from Report Date.
 6. Enter any additional message/requested action from the contractor on the message box.
 7. Click Send.
 8. Update the IRP if needed and document the communication in the client's Notes.

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H. Clients in Part-time Activities

Hide List	Clients in Part-time activities			
Jas ID	Worker ID	Client Name	Components	Other Lists
2641937	058JET		PT SA	
4736907	058JET		PI XP PT	
229895	058JET		XM VE	
42755	058KAC		SA PT	Extension Analysis due
258722	058KAC		BE XM	

- This section displays all open TANF cases in part-time activities excluding exempt clients (exempt = Z codes and/or CA on ACES WORK screen with child under 3 months).
- This section displays clients with part-time components based from the Client Accountability Report hierarchy, Part-time (LESS THAN 32 HRS PARTICIPATION COMBINED: BE, CC, ES, GE, HS, HW, JS, JT, OT, PT, VE, VU, WE, XS. Includes FT, HW, CJ, PE if less than 32 hrs.).
- This section is sorted alphabetically.
- This section displays all other components.

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

DATA SOURCE

The screenshot displays the 'ACTIVE COMPONENTS BY BLOCKS' section of the NEW WORKFIRST CASELOAD MANAGEMENT REPORT web application. The page includes a header with the 'Information Technology Division' logo, a 'Message Center' button, and navigation links: 'Home', 'Main', 'Back', 'Update', and 'Component History'. Below the header, there is a table with the following data:

Name	Jas Id	Case Number	Tanf Status	Phone Number	Returner
[REDACTED]	050434	0410002193670	Open	2067681025	[REDACTED]

Below the table, there is a field for 'Automatic Trans Pay' with a value of 0. The main section of the page is a table with the following columns: 'Comp/Desc', 'Ctr', 'Start', 'Blocks', 'Esd', 'Dshs', 'SchedEnd', 'ActualEnd', and 'Cpl'. The table contains one row of data for 'PT DURT-TSH ENROLLMENT' with a 'Start' date of 02/09/03 and a 'SchedEnd' date of 02/28/03. Below this table, there is a table with the following columns: 'Comp/Desc', 'Contr', 'Start Date', 'Blocks', 'ESD', 'DSHS', and 'SchedEnd'. This table contains 10 rows of data, all with empty fields.

Tips

1. On the Caseload Management Report, click the client's JAS ID.
2. Click Component/IRP Information link on the client's main screen.
3. On the Active Components screen, update the component(s) and complete the other mandatory fields. Update the IRP if needed.
4. Click Update.
5. Document the case record in the appropriate note type.

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

I. Contractors Assigned, No Referral Date

Hide List	Contractors assigned, no referral date					
Jas ID	Worker ID	Client Name	Comp	Cntr	Other Components	Other Lists
2245564	058PES		PP	PTD	SA	
259368	058HAT		PE	3BD		

- This section displays all open, pending and closed TANF cases with active contractors identified on any open component and there is no referral date.
- This section displays the clients' other current components and other critical sections.

No referral date

Contractor Caseload Screen

PKQ R3 REFUGEE & IMMIGRANT FORUM OF SNO CO
Page Number : 1 of 26

Model : REGCOORD
Page Jump: Go

Number of Clients : 0050
Med Back Home

Previous/Next Month Caseload (anyyyyy) Go February, 2003

Name Search First: Last: Find JAS ID Search: Find

Please update one component per client at a time and click the update button on the third column.

Legend Help Terminated Components Client List

Client Name & Jas Id	Case Manager	Case Status	C O M F	Referral Date	Contractor Sck Start Date	Contractor Sck End Date	First Contact Date	Actual Start Date	Actual End Date	Inmed	Monthly	
											Part	Prog
	037STE STEPHOTA, IRINA	Closed Update	LP		01142002	0	0	01142002		Un Exceeded	Y	Y
	037STE STEPHOTA, IRINA	Closed Update	PT		05162002	0	0	05162002		Un Exceeded	Y	Y

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Tips:

1. On the Caseload Report screen, highlight and copy the client's JAS ID.
2. Click the Contractor ID of the client.
3. On the Contractor Caseload screen for the current month, paste the client's JAS ID on the JAS ID Search field and click Find.
4. If the client is not found on the current month's active Contractor Caseload screen, click the Terminated Components Client List link.
5. Click Edit on the Toolbar and enter the client's JAS ID on the Find What Field.
6. Click Find Next.
7. If the client is not on the Terminated Components Client List, click Back to go back to the current month's Contractor Caseload screen.
8. Search for the client's JAS ID in previous month by entering the month and four-digit year on the Previous/Next Month's Caseload field.
9. Click Go.
10. Repeat steps 3 – 8 as needed or until the client's name appears.
11. Enter the client's Referral Date on the Referral Date field.
12. Click Update.

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

J. Clients with TWEP and Extension Analysis Due, equal to or greater than 58 months on TANF

Hide List	TWEP & Extension Analysis Due					
Jas ID	Worker ID	Client Name	Months TANF	Components	Issue	Other Lists
90652	058DOU		065	XB	Extension Analysis due	
216703	058SLD		063	XP PI	Extension Analysis due	
110507	058STO		061	SA	Extension Analysis due	
108902	058LED		060	ZD	Extension Analysis due TWEP due	
48259	058SLD		060	PR SA	Extension Analysis due TWEP due	

- This section includes open TANF cases only without extension analysis in e-JAS or without completed TWEP in ACES.
- This section is sorted by descending order, greatest number of months on TANF on the top of list.
- This report displays the client's TANF counter and current components.

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

Data Source:

Create Extension Analysis - Microsoft Internet Explorer

Information Technology Division
Message Center
Home Main Back

Extension/Child Safety Net Analysis

You are now creating an extension analysis for [REDACTED]

Date of 60 month Case Staffing/Extension Review: 2/14/2003 [REDACTED] m70d0eyy

Please check one main category. (1,2,3,4)
Once the main category is checked, then check the appropriate subcategories.

☐ 1. Adults who cannot or should not be expected to work.

- Extension based on Exempt Status
- Length of Extension: 2 - 12 months

Check one subcategory below:

a. Older needy caretaker relative (55 or older)	<input type="checkbox"/>
b. Caring for an adult with disabilities	<input type="checkbox"/>
c. Caring for a child with special needs	<input type="checkbox"/>
d. Adult with severe and chronic disabilities or facilitated SSI applicant who is likely to be eligible	<input type="checkbox"/>

☐ 2. Adults participating but still receiving TANF Assistance

- Extension Based on Participation
- Length of Extension: 3 - 6 months

Check all subcategories that apply

a. Family violence (issue resolution)	<input type="checkbox"/>
b. Caring for child 3 months old or less	<input type="checkbox"/>
c. Participating (Check appropriate box below)	<input type="checkbox"/>

Start [Icons] [JAS - EXTRA] [Inbox - Micro] [Client Caselo...] [DATA DICTIO...] [NEW WORKPT...] [Create Exten...] 6:43 PM

Tips

- On the Caseload Management Report, click the client's JAS ID.
- Click Case Staffing link on the client's main screen.
- Click "Click Here to Create an Extension Analysis."
- Complete the Extension/Child Safety Net Analysis tool.
- Click Save Extension Analysis.

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

ACES TWEP SCREEN

INQUIRY	TWENTY PERCENT HARDSHIP - TWEP				TWEP A				
Month 04 03	01								
Client ID 000000000	Ctr 60		Client ID 001111111		Ctr 08				
Client ID	Ctr		Client ID		Ctr				
----- New Extensions -----									
Range		Range		Category		Del			
Begin		End							
Month begin		→		←		Last month of			
of Extension						Extension			
----- Current / Historical Extensions -----									
Range		Range		Category		Del			
Begin		End		Ind		Range		Range	
						Begin		End	
						Category		Del	
								Ind	

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

K. Post 60 Months, Extension Due

Hide List	Post 60 months, Extension due					
Jas ID	Worker ID	Client Name	End Date	Components	Issue	Other Lists
29740	058GAL		04/01/2003	XB	TWEP expires <= 60 days	
209162	058SLD		05/01/2003	XM	TWEP expires <= 60 days	

- This section includes open TANF cases on 61 or more months.
- This section includes clients whose TWEP current range end date is within the next 60 days or has an overdue TWEP.
- This section is sorted by TWEP range end date from earliest to latest (ascending).

ACES TWEP SCREEN

[illegible]

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

L. Activity End Preview Section, Daily

Hide List	Activity End Preview Section					
Jas ID	Worker ID	Client Name	Comp	Schd End Date	Other Components	Other Lists
2283388	058SLA	[REDACTED]	JT	03/21/2003		
79927	058JET	[REDACTED]	XM	03/21/2003		
4039588	058SLA	[REDACTED]	XM	03/21/2003		
2816685	058HEI	[REDACTED]	XM	03/21/2003	XB	

- This section displays clients with components with scheduled end dates within 14 days of run date.
- This section is sorted by earliest to latest scheduled end date (lowest to highest).

Data Source

Name	Jas Id	Case Number	Tanf Status	Phone Number	Returner
[REDACTED]	79927	058C009858899	Open	5099221184	

Automatic Trans Pay: 0

Comp/Desc	Ctr	Start	Blocks	Esd	Dshs	SchedEnd	ActualEnd	Cpl
XM - TEMPORARY PHYSICAL INCAPACITY		03/16/2003	18		05/14/03	03/21/2003		

Comp/Desc	Contr	Start Date	Blocks	ESD	DSHS	SchedEnd
XM		03/16/2003	18		05/14/03	03/21/2003

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

II. STEP-BY-STEP

A. Caseload Management Report (Real-time)

This report is available on a Case Manager or Social Worker level only.

1. From your Home Page, click WorkFirst Report
2. On the WorkFirst Report page, click Caseload Management Report (Real-time) to display the worker ID list for the CSO will be displayed. The user's worker ID will be auto-selected. Note: You may also select other worker's caseload from this page.
3. Click "Get Report for Selected Workers" button to confirm the selection.

Client Caseload Management - Report Criteria - Microsoft Internet Explorer

Address: <http://webvanderl.jdc.wa.gov/dsh/workfirst/ee/ee/ClientCaseloadTuner.asp>

Information Technology Division Message Center

Home Page Back

Caseload Management Report Criteria

Please select a CSO: Region 4 CSO IMI - RAINIER AND Display worker list

Get Report for Selected Workers

Sel	Worker	Sel	Worker
<input type="checkbox"/>	SUI, MINH - 041BU1	<input type="checkbox"/>	CHEEK, DEBBIE - 041CHE
<input type="checkbox"/>	DAVIS, DEBORAH - 041DUJ	<input type="checkbox"/>	JAGUSCH, RUTH - 041RLJ
<input type="checkbox"/>	MARAMFEDDY, PRABHAKARA - 041059	<input type="checkbox"/>	MCCLINTOCK, JAMICE - 041JMN
<input type="checkbox"/>	SAINTIER, CSO JAS REPORT - 041CSO	<input type="checkbox"/>	SECORSKY, MICHAEL - 041MOS
<input type="checkbox"/>	TRIMBLE, ARLENE - 041TRJ	<input type="checkbox"/>	TRIMBLE, ARLENE - 041LRL
<input type="checkbox"/>	WEBB, LEO - 041WEB		

Get Report for Selected Workers

4. The real-time Caseload Management Report for the Case Manager level will be displayed.
5. Click the Social Worker button to display the Social Worker caseload.

Client Caseload Management (Real Time) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Go Back Forward Stop Search Favorites Home

Address http://webvander1.de.via.gov/dhs/verifirst/webtest/ClientCaseloadManagement3.asp

Favorites

Links

Media

ACES Project Ho...

TRP Information

DHS-ESA - MR...

e-SIS develop...

e-SIS Production

eset Test

Parsons DHS G...

MSL.com

New ESA v1

Radio Station G...

webbonds

DHS ADAMS D...

Caseload Management Report

Real Time report for ARLENE TRIMBLE

☒ By Case Manager Show report for CSO 041 ☐ By Social Worker

Hide List Clients with no components/ activities		
Jas ID	CSO	Client Name
2569754	043	[REDACTED]

Hide List Clients referred back from ESD						
Jas ID	CSO	Comp	Date	Other Components	Other Lists	
26972	043	RB	11/15/2002		PT: Is Referral Date GZ: Overdue component PE: Overdue component CI: Overdue component	
7544	043	RB	01/17/2003		RZ: Overdue component	
2569288	043	RB	01/17/2003		RE: Overdue component XE: Overdue component CJ: Overdue component BE: Overdue component CC: Overdue component PP: Overdue component SA: Overdue component PT Time Activities	
2604748	043	RB	03/03/2003		PT: Overdue component	
2332588	043	RB	03/03/2003		BX: Open BX	

Hide List Processing referral back on non-participating client						
Jas ID	CSO	Comp	Start Date	Other Components	Other Lists	
2425587	043	UNW	08/22/2002		PT: Overdue component RO: Overdue component CC: Overdue component	

Done

Start

Inbox - Photos...

CSC: Case Plans

CASE MANAGE...

NEW WORKFI...

Client Caselo...

8:04 AM

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

Client Caseload Management (Final Test) - Microsoft Internet Explorer

Address: http://webvarden1.dcs.via.gov/dsh/jwt/first/jas/test/ClientCaseloadManagement3.asp

Attention needed on WPLEX referral

Jas ID	CSO	Client Name	Comp	Start Date	Other Components	Other Lists
2026678	041		KK	01/01/2003		
2027256	041		KK	01/01/2003		
2046781	041		KK	01/01/2003		

Hide List

Overdue RI components

Jas ID	CSO	Client Name	Comp	Schd End Date	Other Components	Other Lists
2066669	043		RI	01/10/2003		
2037082	043		RI	01/10/2003		
2738671	041		RI	01/15/2003		20H: Overdue component RI: Overdue component Part Time Activities
2063173	041		RI	01/20/2003		
2478644	041		RI	01/25/2003		
2150278	041		RI	01/25/2003		
2016585	041		RI	01/25/2003		

Hide List

Overdue Components

Jas ID	CSO	Client Name	Comp	Schd End Date	Other Components	Other Lists
2028675	041		HS	06/30/2000		
2166694	041		HS	06/30/2001		
2047687	041		ZC	09/16/2002		
2047687	041		2D	09/17/2002		
2066669	041		PT	09/19/2002		
2054485	041		XC	09/23/2002		
2025186	041		2B	09/23/2002		
2054485	041		C1	09/30/2002		
2025186	041		IS	09/30/2002		
2066669	041		HW	09/31/2002		
2047687	041		2A	09/31/2002		

Client Caseload Management - Microsoft Internet Explorer

Address: http://webvarden1.dcs.via.gov/dsh/jwt/first/jas/test/ClientCaseloadManagement.asp

32285 SSIDR PRAGA, MICHELLE RJ 01/23/2003 JS

Hide List

Contractor/Client Issues

Jas ID	Worker ID	Client Name	Comp	Grtr	Issue	Other Lists
215552	00581T		FF	DSJ	No first contact	Part Time Activities
2047056	00581T		CJ	1AV	No first contact	
4321101	00581T		FF	DSJ	No first contact	20H: No referral date
2048517	00581T		FF	DSJ	No first contact	
2450294	00581T		FF	DSJ	No first contact	20H: No referral date
308309	00581T		FF	DSJ	No first contact	
3082320	00581T		FF	DSJ	No first contact	
2184614	00510R		FF	DSJ	No first contact	2A: Expires within 34 days
4317776	00510R		VE	1AV	No first contact	
4317776	00510R		PT	1AV	No first contact	
4756604	00510R		SB	1AV	No first contact	
2428836	00510R		FF	DSJ	No first contact	2A: Expires within 34 days
2053167	00510R		CJ	1AV	No first contact	
167838	00510R		SB	1AV	No first contact	
238782	00510R		XP	ETS	No first contact	20H: Expires within 14 days
4455142	00510R		PT	1AV	No first contact	
4455679	00510R		VE	1AV	No first contact	
206733	00510R		PT	1AV	No first contact	
458733	00510R		VE	1AV	No first contact	
4738330	00510R		PT	1AV	Future actual start	
4738330	00510R		VE	1AV	Future actual start	

Hide List

Clients in Part-time activities

Jas ID	Worker ID	Components	Other Lists
2450294	00581T	PT 2A	

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

The screenshot displays a web application interface for 'Client Caseload Management'. It features three main data tables. The first table, 'TWEET & Extension Analysis Due', has columns for Case ID, Worker ID, Client Name, Months TANF, Components, Issue, and Other Lists. The second table, 'Post 60 months, Extension due', shows a message 'No Clients in this List'. The third table, 'Contractors assigned, no referral date', has columns for Case ID, Worker ID, Comp, Cntr, Other Components, and Other Lists. A large black redaction box covers the 'Client Name' column in the first two tables and the 'Worker ID' column in the third table.

Case ID	Worker ID	Client Name	Months TANF	Components	Issue	Other Lists
4348320	015817	[Redacted]	043	XP	Extension Analysis due	

Case ID	Worker ID	Comp	Cntr	Other Components	Other Lists
132500	015817		LAB		
4522220	015817	XP	PTG	IS	
4401749	015817	II	PTG	SA	
3750143	015817	XP	PTG	IS	
2874923	015109	XP	PTG		XC: Expires within 14 days XM: Expires within 14 days
208177	015817	XP	PTG	IS	Extension Analysis due
4832308	015109	XP	PTG	XM 20 job	Part Time Activities
2150087	015817	XP	PTG	IS	Extension Analysis due
208177	015817	II	PTG	IS	Extension Analysis due

Case ID	Worker ID	Comp	Schd End Date	Other Components	Other Lists
2446154	015006	IS	03/21/2003	PT PG	
2446107	015006	XM	03/24/2003		
4429323	015817	XC	03/24/2003		

Caseload Management Report (Real-time)

LEGEND:

- Hide Empty Reports: Hides all lists that have no client information.
- Show Hidden Reports: Re-displays all hidden lists.
- Hide List: Hides the selected list only.
- Show Report for CSO: Drop-down box for specific CSO selection if the worker has multiple CSO access.
- Social Worker: 7-digit User ID from the Demographics screen.
- Case Manager: 6-digit Worker ID from the Demographics screen.

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

B. WorkFirst Caseload Management Report (Daily)

This report is available on a CSO, Case Manager, or Social Worker level.

1. From your Home Page, click WorkFirst Report
2. On the WorkFirst Report page, click Daily Caseload Management Report to display the daily caseload report for the CSO or Case Manager.
3. Click the preferred selection: CSO report or Worker List.
4. For CSO level report, select the CSO and click the button, Get Report for CSO to display the client list for all workers in the CSO.

Clients with no components/ activities

Jes ID	Worker ID
2582784	041ARL
2521884	041C80

Clients referred back from ESD

Jes ID	Worker ID	Client Name	Comp	Date	Other Components	Other Lists
10172	041ARL		RE	11/15/2002		PT: No referral data GE: Overdue component FE: Overdue component CI: Overdue component
2565188	041ARL		RE	01/17/2003		SE: Overdue component NE: Overdue component CI: Overdue component BE: Overdue component CC: Overdue component PF: Overdue component

CSO Report

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

5. To view the CSO-level report by worker for the specific selected CSO, select the CSO, and click the button, Display Worker List.
6. Select the worker (s) and click the button, Get Reports for Selected Worker.
7. The Case Manager level report will be displayed.
8. Click the Social Worker button to display the Social Worker caseload.

Caseload Management Report Criteria

Please select a CSO: Region 4 CSO (M) - RAINIER

AND... Get Report for CSO ... OR ... Display worker list

Get Report for Selected Workers

Sel	Worker	Sel	Worker
<input checked="" type="checkbox"/>	SUI, MINH - 041BUT	<input type="checkbox"/>	CHEEK, DEBBIE - 041CHE
<input type="checkbox"/>	DAVIS, DEBORAH - 041DJD	<input type="checkbox"/>	JAGUSCH, RUTH - 041RIJ
<input type="checkbox"/>	MARAMREDDY, PRABHAKARA - 041D99	<input type="checkbox"/>	MCCLINTOCK, JANICE - 041JMN
<input type="checkbox"/>	RAINIER, CSO JAS REPORT - 041CSO	<input type="checkbox"/>	SECORSKY, MICHAEL - 041MJS
<input checked="" type="checkbox"/>	TRIMBLE, ARLENE - 041TRI	<input checked="" type="checkbox"/>	TRIMBLE, ARLENE - 041ARL
<input type="checkbox"/>	WEBB, LEO - 041WEB		

Get Report for Selected Workers

NEW WORKFIRST CASELOAD MANAGEMENT REPORT

By Case Manager **Caseload Management Report** By Social Worker
Daily run report for CSO 041

Clients with no components/ activities		
Case ID	Worker ID	Client Name
2568754	041ARL	[REDACTED]

Clients referred back from ESD						
Case ID	Worker ID	Client Name	Comp	Date	Other Components	Other Lists
10412	041ARL	[REDACTED]	RE	11/15/2002		PT: No referral data US: Overdue component PE: Overdue component CI: Overdue component
2568754	041ARL	[REDACTED]	RE	01/17/2003		WC: Overdue component NE: Overdue component CI: Overdue component BE: Overdue component CC: Overdue component PF: Overdue component SA: Overdue component Part Time Activities
7843	041ARL	[REDACTED]	RE	01/17/2003		#2: Overdue

Daily Caseload Management Report

LEGEND:

- Hide Empty Reports: Hides all lists that have no client information.
- Show Hidden Reports: Re-displays all hidden lists.
- Hide List: Hides the selected list.
- Show Report for CSO: Drop-down box for specific CSO selection if the worker has multiple CSO access.
- Social Worker: 7-digit User ID from the Demographics screen.
- Case Manager: 6-digit Worker ID from the Demographics screen.